

Preparing a batch - ftwPro 1099Wiz

11/24/2025 11:56 am CST

Follow the steps below to create a 1099 or 5498 batch, run necessary checks, and select the appropriate fulfillment options.

Step 1: Create a New Batch

Click **+ Create New Batch** in the upper-left corner of the **Batch** screen.

Enter a **Batch Name** of your choice and select **Create New Batch**.

- This name is for your records only; the IRS does not see your naming conventions.
For corrective batches be sure to select the **Corrective batch?*** checkbox in the right-hand corner. Refer to [1099 Corrections](#) for additional information on corrective batches.

You will be redirected to the individual batch screen to select payers and payees.

Show Batches - 1099-R - 2024

ftwilliam.com's 2024 1099 fulfillment service will end for annual maintenance November 19, 2025, at 3 PM status by 12 PM CST on November 17, 2025.

1099-R ▾ 2024 ▾ Change 1099 form

Current Batches

+ Create new batch

New Batch - 1099-R

Enter batch name:

Corrective batch?* ☐

Create new batch

* Corrective batch fulfillment includes ONLY corrections from previous ftwilliam.com fulfillment that were previously submitted via batch process.
* Corrective records can only be submitted via a corrective batch.
* Filing electronic state corrections is not supported.
* A corrective batch may only include either Type 1 or Type 2 correction records.
* Separate corrective batches will need to be created per correction type.

Batch Name	Batch ID	Payer EditCheck	Payee EditCheck	State EditCheck	Payer #	Payee #	Batch Locked Status	State Status	Payer Completion Date	Payee Completion Date	E-File Completion Date
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Step 2: Select Payers and Payees

Click **Select Payers** in the upper-left corner of the batch screen.

A window will display all available payers for your account. This window provides the following options for selecting which payers/payees to add to (or remove from) the batch:

- Select All Unselected:** Adds all available payers and payees to the batch at once (only those not already in a batch).
- Unselect All Selected:** Removes all payers/payees from the batch.
- Select Payees:** Allows individual selection of payers and payees. If payees exist, a blue **Select Payees** link appears next to the payer name.

Batch: Sample 1099R Batch | Batch

Select/Show Payers/Payees

Select Payers

Payees Report

Payers Report

State Fulfillment

(Check out the new 1099 s

State Returns (Must lock batch first)

Print 1096/1099/5498

Batch must be locked before printing options available

Fulfillment Service - 0 Payee(s), 0 Payer(s)

Batch must be locked before fulfillment options available

FIRE System

Batch must be locked before FIRE sytem options available

Select 1099-R Payees/Participants

Select Payers: Sample1099RBatch - 56680658

BATCH MODE

Note: Only selects Payers where 'Edit Payer' item c is 'Yes' (Responsible for 1099 Filing)

Select All Unselected

Unselect All Selected

Number of Payees in Batch	Name	Select Payees
0	ACNH Residential Services LLC	No Payees
0	Advent Children Profit Sharing Plan	No Payees
0	Air Nomad Profit Sharing Plan	Select Payees
0	AVALANCHE 401(k) Plan	Select Payees
0	Example Company	Select Payees

When manually selecting via **Select Payees**, a screen opens where you can choose all or some payees for that plan/payer. Click **Update** to save and close.

Select 1099-R Payees/Participants

Update

Close Window

Select Individual Participants

<input checked="" type="checkbox"/> Selected	Process Date	Correction IND	Name	BatchName	Batch ID
<input checked="" type="checkbox"/>		Original	David, Bailey		
<input checked="" type="checkbox"/>		Original	Greg, Johnston		
<input checked="" type="checkbox"/>		Original	Max, Newsom		
<input checked="" type="checkbox"/>		Original	Ned, George		
<input checked="" type="checkbox"/>		Original	Paul, Howell		
<input checked="" type="checkbox"/>		Original	Sally, Smith		
<input checked="" type="checkbox"/>		Original	Trent, Tucker		

Update

Close Window

The number of selected payees will appear on the left side of the **Select 1099-R Payees/Participants** page.

Select Payers: Sample1099RBatch - 56680658

BATCH MODE

Note: Only selects Payers where 'Edit Payer' item c is 'Yes' (Responsible for 1099 Filing)

Select All Unselected

Unselect All Selected

Number of Payees in Batch	Name	Select Payees
7	Example Company	Select Payees

Step 3: Run Edit Checks and Lock the Batch

Important: Batches must be locked before fulfillment options are available.

To lock a batch:

- Click the **Locked** link under the **Fulfillment Service** heading.

Batch: Sample1099RBatch | BatchID: 56680658

Select/Show Payers/Payees
[Select Payers](#) | [Payees Report](#) | [Payers Report](#)

State Fulfillment (Check out the new 1099 state charts and technical documentation in our [1099 User Guide](#))
State Returns (Must lock batch first)

Print 1096/1099/5498
Batch must be **locked** before printing options available



Fulfillment Service – 7 Payee(s), 1 Payer(s)
Batch must be **locked** before fulfillment options available

FIRE System
Batch must be locked before FIRE sytem options available

- OR click the **lock icon** next to the batch name on the **Show Batches** page.

Current Batches

+ Create new batch

Batch Name	Batch ID	Payer EditCheck	Pa Edit
Sample1099RBatch 	56680658		

Click to lock.

Before locking:

All included payers and payees must pass edit checks. This option automatically populates when the Locked link/icon is selected.

- If edit checks have not been run, click **Run Edit Checks**.
- Once all checks pass (denoted by the **Ok** links), the option to lock the batch will be enabled and a warning: > “Are you sure you want to lock this batch? Once locked, participant information cannot be changed.”

Step 4: Select Fulfillment Options

Once the batch is locked, the following options become available:

- Print 1096/1099/5498:** Generate PDF files or batch data for printing.
- Fulfillment Services:** Authorize ftwilliam.com to e-file the batch and/or send paper copies to payees for a fee.
See [ftwilliam Fulfillment Services](#) for details on fulfillment options.
 - Federal E-file
 - Print and Mail Services
 - State E-file**NOTE:** State filings require separate edit checks and locking before enabling this option. See [State Fulfillment Services](#) for more details.
- FIRE File Download (if applicable):** Available for accounts with a **TCC** entered in the profile. (See [Preparing a .txt file for FIRE](#) for more details.)

Batch: Sample1099RBatch | BatchID: 56680658

Select/Show Payers/Payees

[Payees Report](#) | [Payers Report](#)

State Fulfillment (Check out the new 1099 state charts and technical documentation in our [1099 User Guide](#))

[State Returns](#) | [Lock State Returns](#) | ???

Print 1096/1099/5498

[1096](#) | [Copy A 2-up](#) | [Copy B, C, 2 \(Blank\)](#) | [Copy 1 State \(Blank\)](#)

Print Payer Copies (includes background image)

[1096](#) | [Copy A](#)

Fulfillment Service - 7 Payee(s), 1 Payer(s)

Federal/State/Payee Fulfillment Not Available - State returns must be locked

Federal/State Fulfillment Not Available - State returns must be locked

State Fulfillment Not Available - State returns must be locked

[Federal/Payee \\$33.95 \(2.40\)](#)

[Federal Only \\$23.80 \(0.95\)](#)

[Payee Only \\$28.35 \(1.60\)](#)

FIRE System

[Download 1099-R Data for FIRE System](#) | [Review FIRE Data File](#) | [1099 E-filing Information](#)